

CHAPTER X. BEST PRACTICES

Each state and local government agency is faced with the same dilemma of how to increase their Small Business (SB) and Disabled Veteran Business Enterprise (DVBE) percentages. Each state and local government agency must appoint an SB/DVBE Advocate to assist their department in achieving the participation goals of 25 percent Small Business participation and 3 percent DVBE participation, but it is up to the SB/DVBE Advocate to create and implement sound procedures for their department.

The Department of General Services initiated the State Agency Recognition Awards (SARA) ceremony to acknowledge state agencies for their implementation of innovative ideas that increased SB and/or DVBE participation in State purchasing and contracting. DGS recognizes the dedication and the hard work of agencies that have embraced the SB/DVBE program.

From initial inception of both the SB and DVBE programs, state agency and department advocates have willingly shared their experience and successful actions to the benefit of newer inexperienced advocates as well as the “seasoned veterans. The following are some of the “best practices” that have been implemented within various state and local government agencies that you may want to consider implementing in your department’s program:

Education

- SB/DVBE Advocates place high importance on diligently attending all meetings that pertain to the SB/DVBE program to remain up-to-date with new policies, changes, trends, laws and regulations. Make a point of participating in as many meetings as possible.
- Facilitate partnerships of large vendors with SB and DVBE firms to successfully subcontract on large projects
- Create an alliance and network with other SB/DVBE Advocates to assist with your department’s participation goals
- Design outreach materials that are directly focused towards SB/DVBE outreach events.
- Advocate not only for your department, but also for the SB/DVBE community.

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Bid Activities and Practices

- Create an internal list/database of Small Business and Disabled Veteran Business Enterprise companies that have made contact with your agency for easy access to the procurement analysts within your department as well as your end customers.
- Attend your department's pre-bid conferences and be the direct resource for your contract analysts and your SB/DVBE program.
- For every IFB above \$5,000 issued by your department, make sure your name is included as a direct line of contact.
- Ensure that you as the SB/DVBE Advocate are one of the signature reviewers of any DVBE Waivers that are requested for solicitations.
- Follow-up with your potential vendors when they ask for assistance from you, don't leave them in the dark to try to figure out the bureaucratic procedures.
- Pre-review prime-bidder DVBE documentation to assure they fully meet program requirements, thereby reducing the potential for program non-compliance and losing the bid opportunity.
- Create DVBE Program Checklists to assist program staff review DVBE, GFE or subcontractor selection.
- Monitor your department's participation activity levels monthly so you know what your SB and DVBE participation levels are throughout the fiscal year. In this way you will be consistently "on top" of what your department is doing and will not be blindsided at the end of June.

Internal Training and Outreach

- Work cooperatively with your contract office, procurement office and your IT shop to build a relationship with staff so they know what is expected of everyone so your department can achieve the goals.
- Many vendors may not state outright they are SB or DVBE certified. Train buyers to look up all vendors on the SB/DVBE website
- Create an incentive for credit card users by holding a raffle. Anyone who provides proof of purchase from a SB/DVBE gets their name entered in a monthly raffle. (Office Max will provide gifts for the raffle).

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- For credit card purchases, create a website (or packet) for internal users, listing by commonly purchased commodity, SB/DVBE vendors who accept the card.
- Review current blanket orders to find where a non-SB/DVBE vendor can be substituted for a SB/DVBE vendor.

SB/DVBE Community Outreach

- Ask current vendors if they meet the criteria for SB or DVBE certification. If they do, help them get them to get certified.
- Hold an internal vendor show. Allow SB/DVBE vendors to have a booth and have authorized requestors/purchasing personnel meet SB/DVBE vendors and view their product/services.
- Conduct outreach events and work individually with SB/DVBE firms to bridge the programs and vendors together
- Add to the department SB/DVBE Web information a listing of the commodities and services routinely used by your department for SB/DVBE businesses to gauge those departments most likely to use their services/commodities.

The above suggestions represent just some of the successful actions and “best practices” as practiced by various departments. Each department is different and has its own unique needs and you will be the best gauge of what will or will not work. However, the first and most important “best practice” will be that of opening lines of communication.

Attached is a link to the most recent SARA awards and a list of Best Practices:

<http://www.pd.dgs.ca.gov/smbus/bestpractices2005.htm>